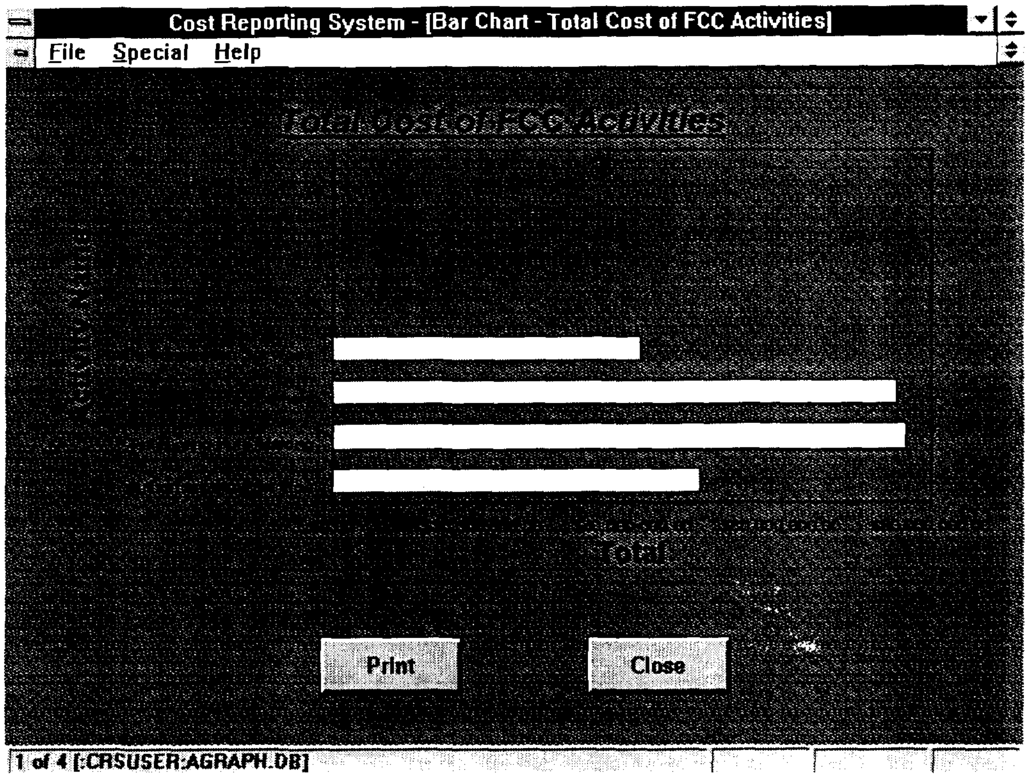
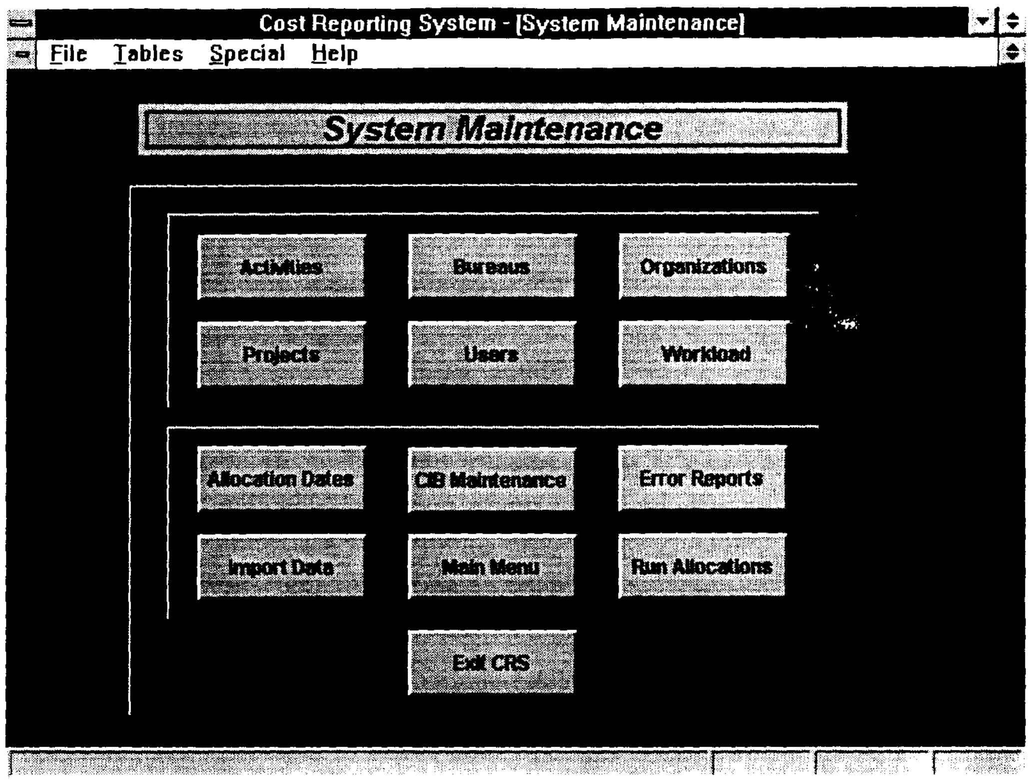
Figure 3-9 **Graphs - example**



3.4 System Maintenance

By clicking on the Maintenance button on the OMD Options screen, the user can advance to the System Maintenance screen shown in Figure 3-10.

Figure 3-10 **System Maintenance Screen**



Certain users in OMD need to have system maintenance privileges. The following sections detail the screens available to these users. *Note: Only systems administrators have access to maintenance functions. All other users will not be able to access the system maintenance screen.*

The System Maintenance of the CRS refers to the ability to add, delete, or update any of the data in the system reference tables as well as importing and validating data from external sources (e.g., FFS, CIB-TRS). The CRS reference tables are the following:

- Activity - This table contains all of the valid activity codes and their descriptions.
- Bureau - This table contains all of the valid bureau codes and their names.

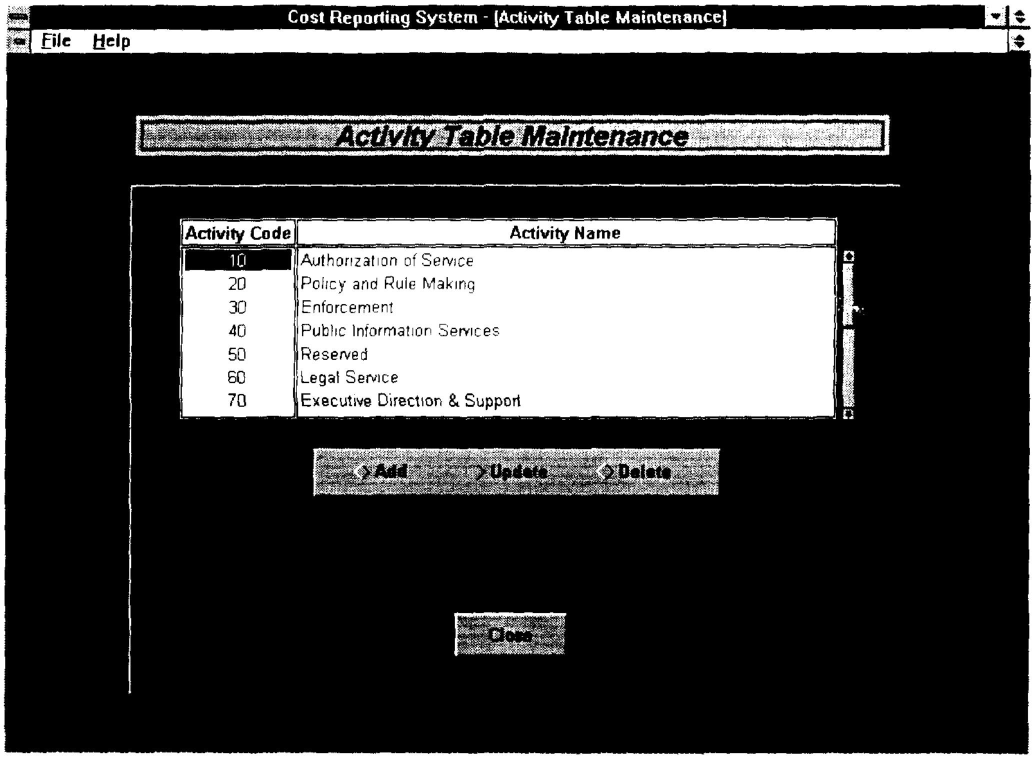
- Organization - This table contains all of the valid organization codes and names, and the bureau code to which the organization belongs.
- Project - This table contains all of the valid project codes and their descriptions.
- User - This table contains information on all CRS users (e.g. User Ids, Access Privileges).
- Workload - This table contains the cost data that is received from FFS. Cost data in this table is categorized by fiscal year, month, organization code, activity code, and project code.

The following sections explain how to navigate through each of the maintenance functions illustrated on the System Maintenance screen.

3.4.1 Activities

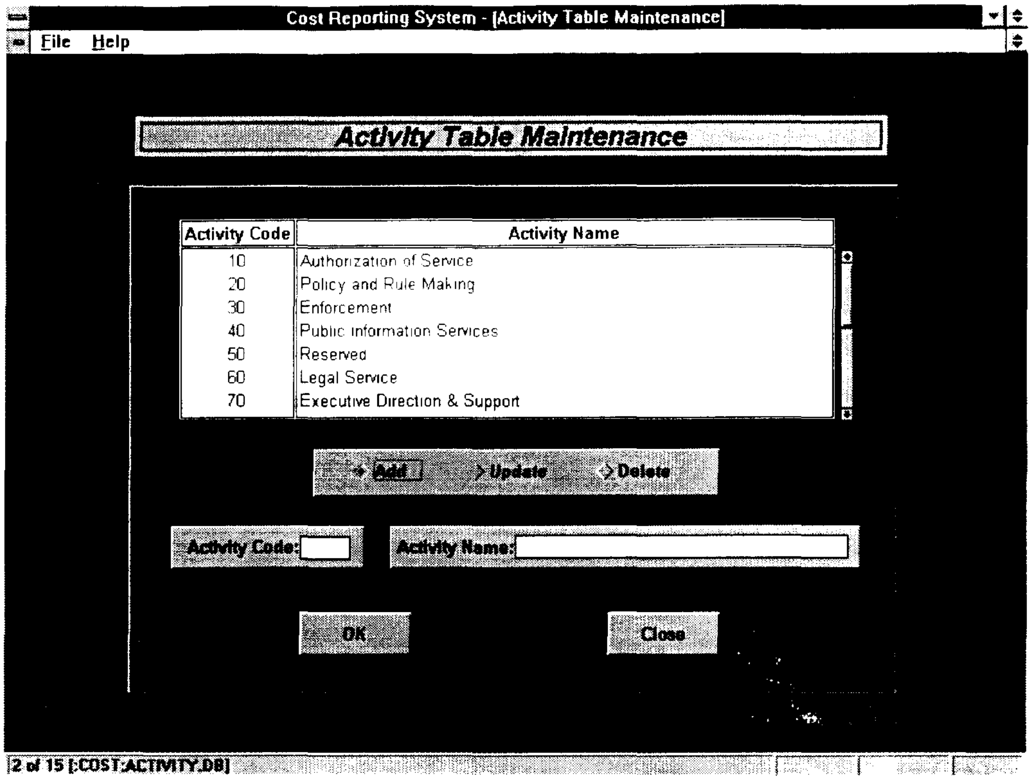
After clicking the Activities Button, the Activity Table Maintenance screen opens. Figure 3-11 shows the described screen. Users may add, update, or delete records from the Activity Table by selecting from the choices on the screen.

Figure 3-11 ***Activity Table Maintenance Screen***



For example, to add an activity, the user must select the Add button. The user is then prompted to enter an activity code and activity name in the appropriate text boxes. *Note: Only new activities will successfully be added to the table. Existing activities can not be re-entered into the table.* Figure 3-12 illustrates how to add new activities to the reference table.

Figure 3-12 **Activity Table Maintenance Screen - Add Table**

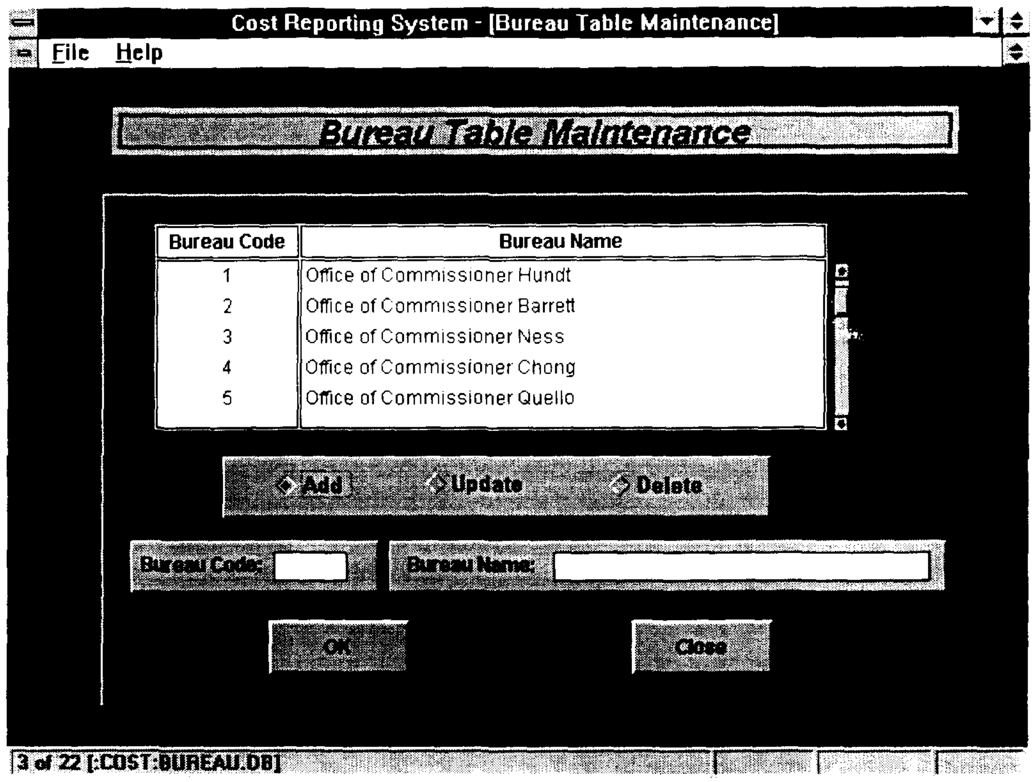


To update or delete activities, the user selects either the Update or Delete buttons and completes the appropriate text boxes. The user must click the OK button to update or delete the record. The Close button returns the user to the System Maintenance screen.

3.4.2 Bureaus

By clicking the Bureaus button on the System Maintenance screen, the user can view the Bureau Table Maintenance screen. Figure 3-13 shows the screen as it appears to the user. In this window, the user has the ability to add new bureaus, update the name of existing bureaus, and delete existing bureaus.

Figure 3-13 ***Bureau Table Maintenance Screen***



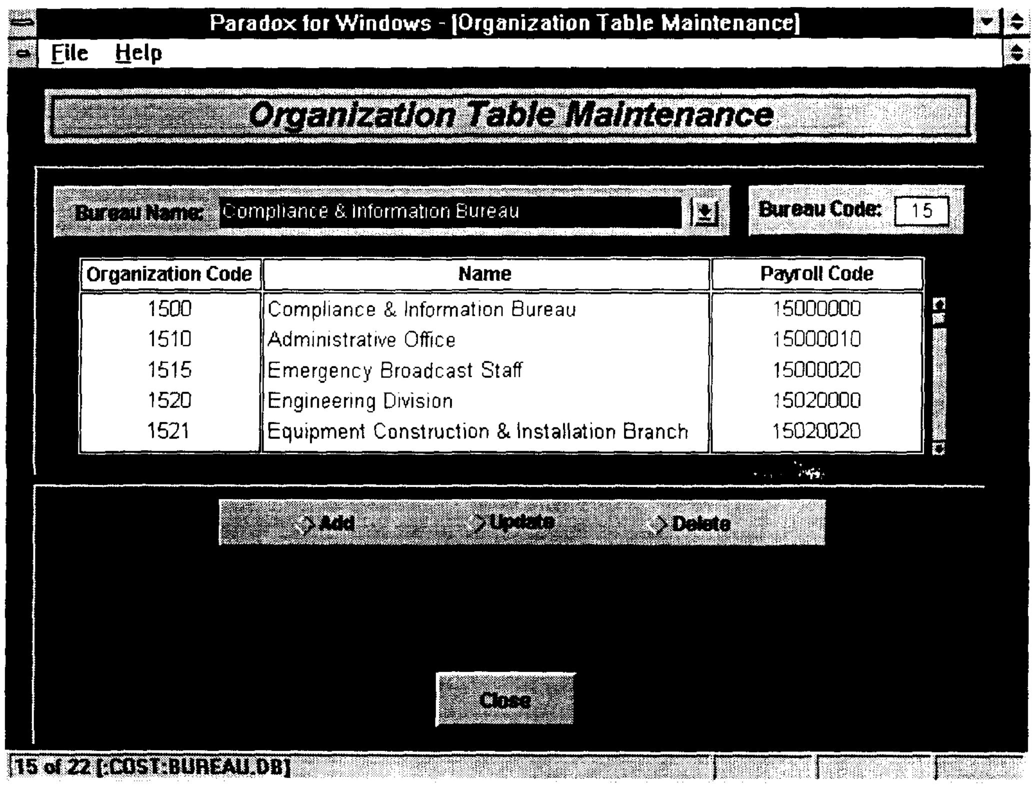
To add a bureau to the table, the user must first select the Add option and then enter the new bureau name and code in the appropriate text boxes. To add the bureau to the table, the user must then click the OK button.

To update or delete bureaus, the user selects either the Update or Delete button and completes the name of the existing bureau and other required text boxes. The user must click the OK button to update or delete the record. The Close button returns the user to the System Maintenance screen.

3.4.3 Organizations

This button opens the Organization Table Maintenance window which appears in Figure 3-14. To add, delete, or update the Organization Table, the user must select the choice from the options available. After selecting one of the three options, the user must fill in all text boxes and click the OK button. The user may only update or delete existing organizations.

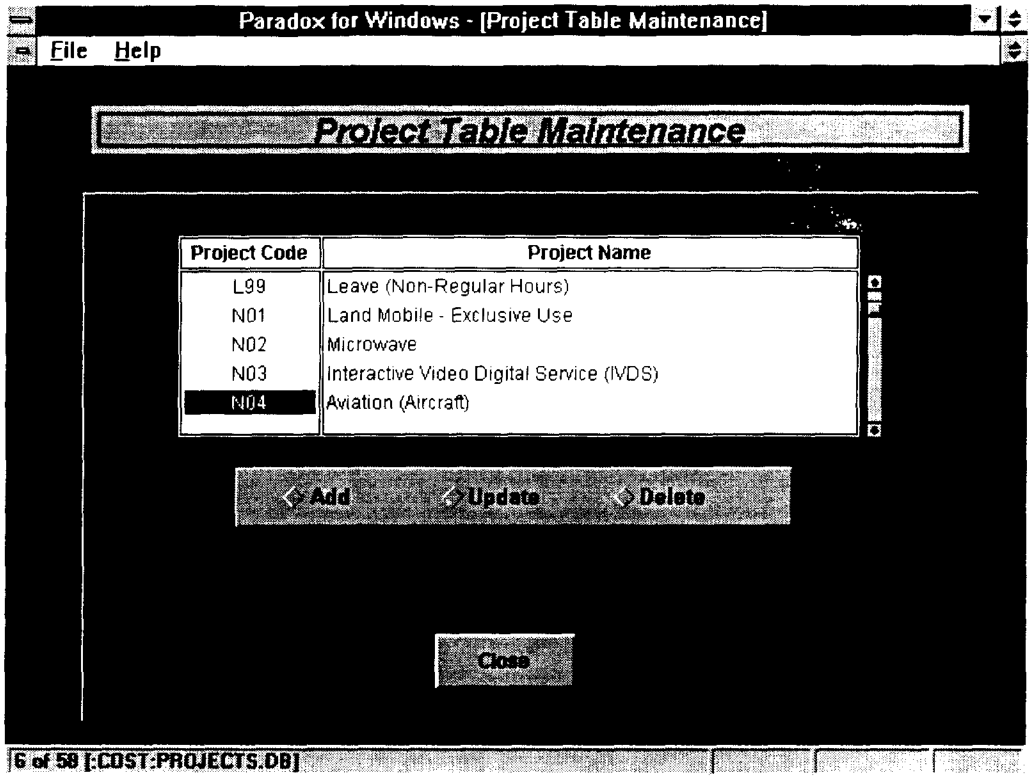
Figure 3-14 **Organization Table Maintenance**



3.4.4 Projects

This button opens the Project Table Maintenance window. To add, delete or update projects, the user must select the particular option and fill in all required text boxes. *Note: Projects may only be deleted if not used in the table Workload.* Figure 3-15 represents the screen as it appears to the user.

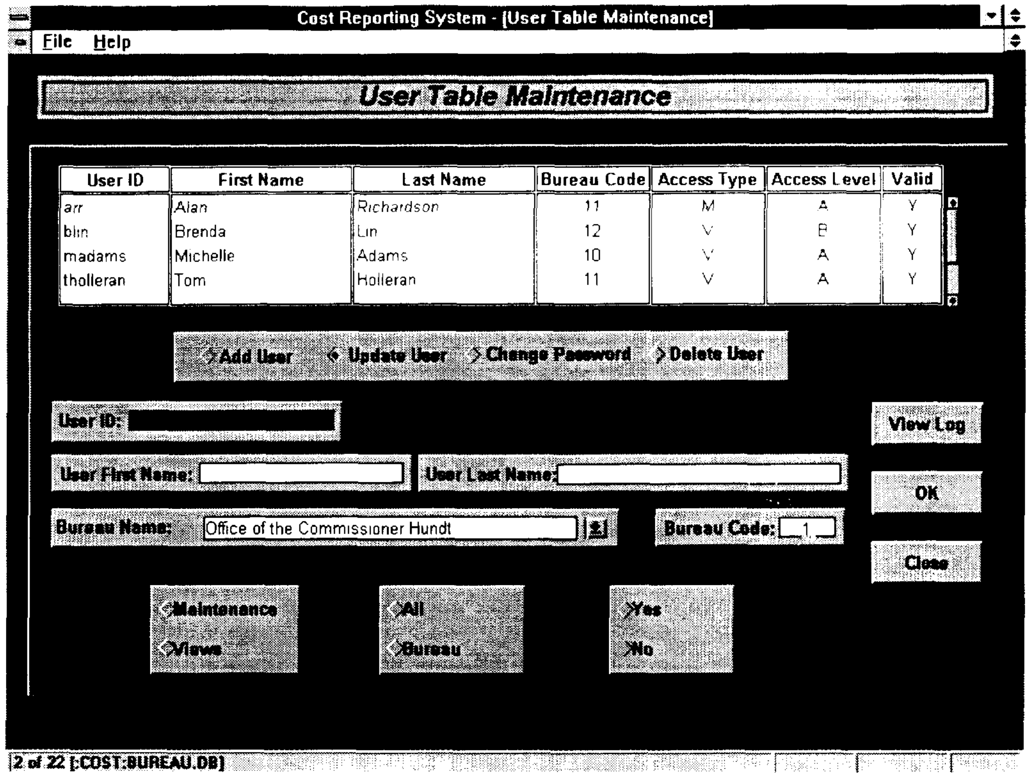
Figure 3-15 ***Project Table Maintenance Screen***



3.4.5 Users

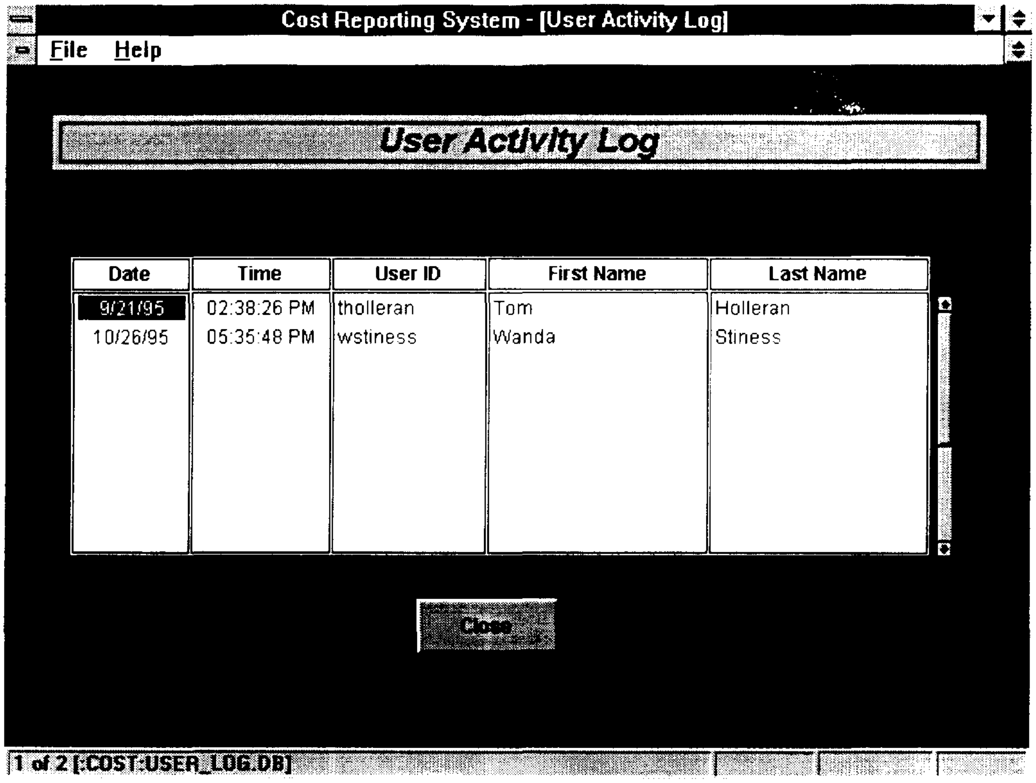
This button opens the User Table Maintenance window. The screen is shown in Figure 3-16. In this window, the user may add, update, or delete users by selecting the desired option and fill in the required text boxes. Each user has the option of several privileges to the system. The user should be certain of which potential users have maintenance or viewing capabilities as well as whether or not the new users have viewing privileges to all organizations/bureaus or bureau-specific viewing rights. To execute each task, the user must click the OK button. The User Table Maintenance screen also allows the user to view the User Log by clicking the View Log button.

Figure 3-16 ***User Maintenance Screen***



After clicking the View Log button, the User Activity Log window appears. Figure 3-17 illustrates the screen. The User Log shows all past and present activity on the CRS system including user id, date, time, and user name.

Figure 3-17 **User Log Screen**



3.4.6 Workload

This button opens the Locate Workload Data window. Figure 3-18 shows the window as it appears to the user. This window allows the user to set parameters for viewing the raw accounting data as imported from FFS.

Figure 3-18 ***Locate Workload Data Screen***

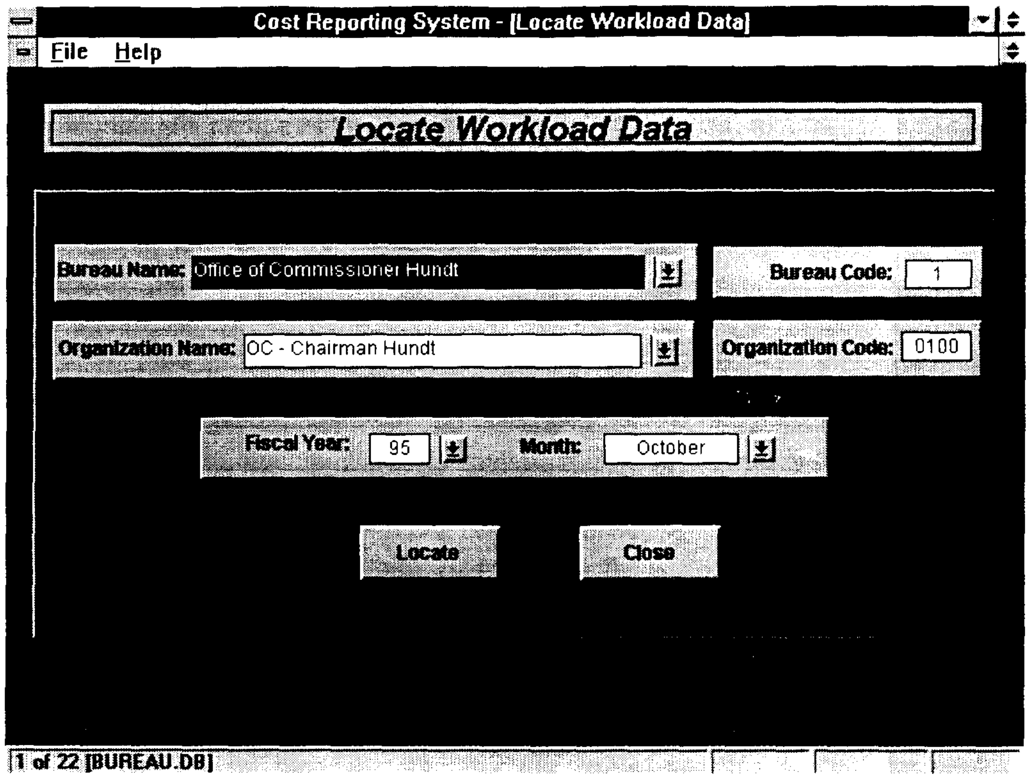
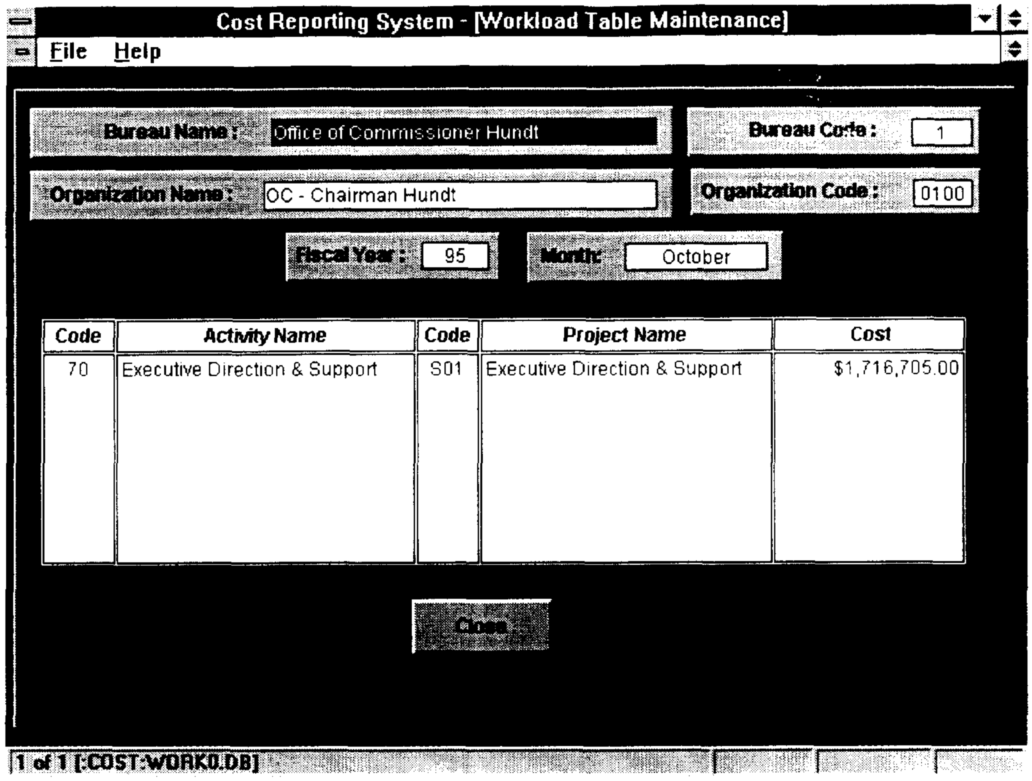


Figure 3-19 ***Workload Table Maintenance Screen***



The user must select a bureau from the bureau drop-down list box, and organization from the organization drop-down list box. In addition, the user must select which fiscal year and month. Once the parameters are sets, the user must click on the Locate button. If data exists for the parameters selected, the user is brought to the Workload Table Maintenance window shown in Figure 3-19.

Unlike most of the other maintenance screens available in CRS, this screen is for viewing purposes only. Changing such as adding, updating, or deleting cost data for any organization are not allowed. The Close button returns the user to the previous screen.

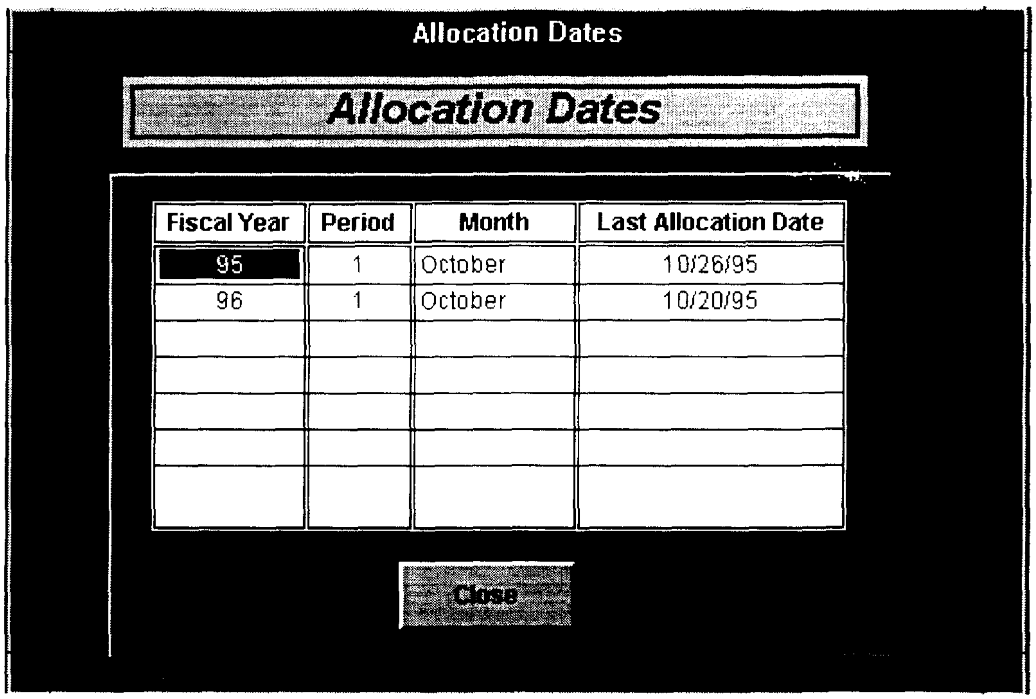
The CRS System Maintenance screen contains a series of buttons that the user may use to do several functions non-related to reference tables. These buttons include:

- Allocation Dates - This button allows the user to view the dates that data had previously been allocated.
- CIB Maintenance - This button allows the user to maintain CIB data for CRS system processing.
- Error Reports - This button allows the user to view data that failed validation checks.
- Import Data - This button imports FFS cost data.
- Run Allocations - This button distributes indirect costs (e.g. overhead costs across activities, organizations, and projects.
- Main Menu - This button returns the user to the OMD Options screen.

3.4.7 Allocation Dates

After clicking the Allocation Dates button, the Allocation Dates window opens. This window is shown in Figure 3-20 The user may view the dates of past cost allocations and the particular fiscal year, month and period combination. To exit this screen, the user must click the Close button.

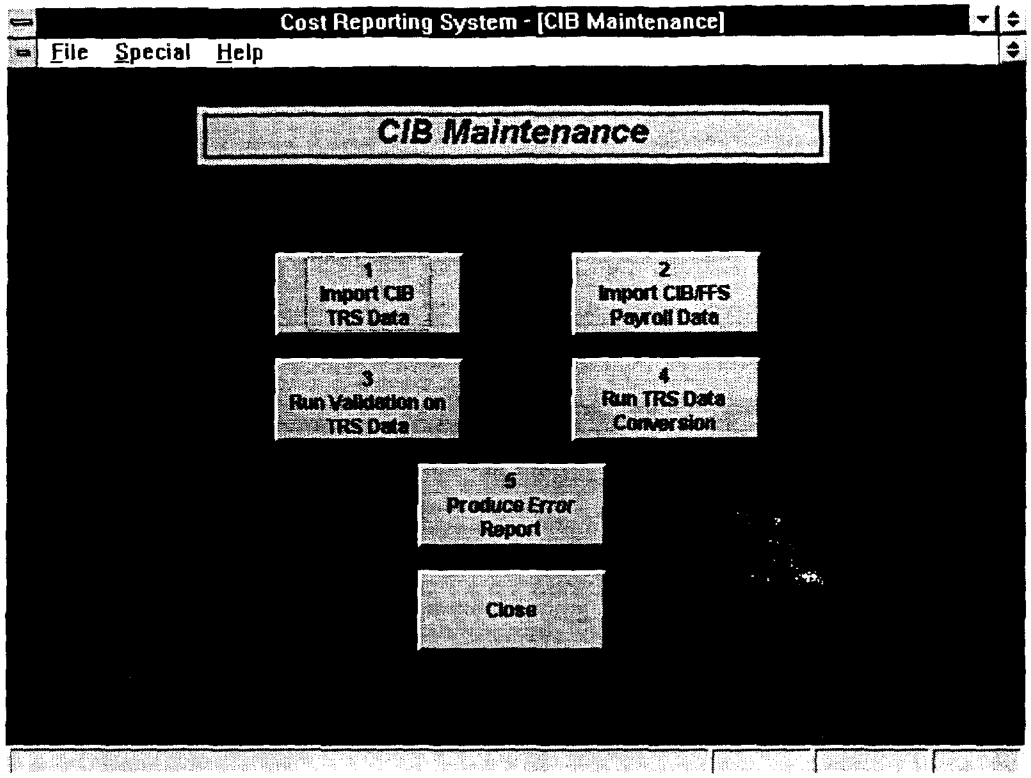
Figure 3-20 **Allocation Dates Screen**



3.4.8 CIB Maintenance

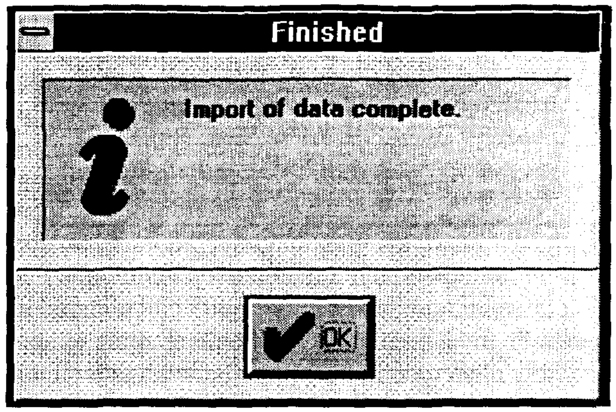
After clicking the CIB Maintenance button, the CIB Maintenance screen appears. This window allows the user to handle the CIB data from the field offices. The screen appears as shown in Figure 3-21.

Figure 3-21 ***CIB Maintenance Screen***



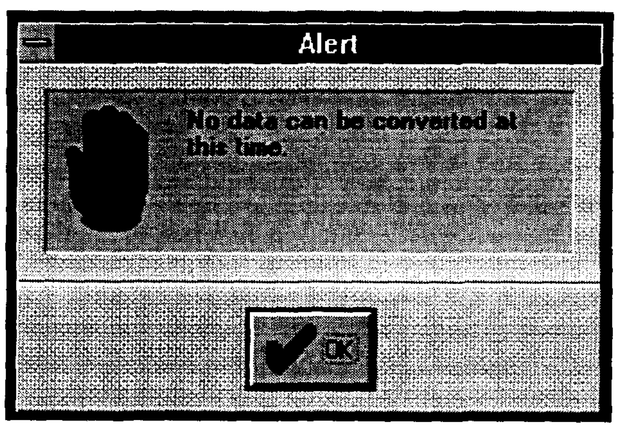
The user must run several procedures from this screen. The user must first import data from the CIB field offices by clicking Import CIB/TRS (Time Recording System). To import the FFS data needed to allocate the costs for CIB, the user must then click Import CIB/FFS Data. In both instances, the system notifies the user that importing is complete with system messages as shown in Figure 3-22.

Figure 3-22 ***Import Message Box***



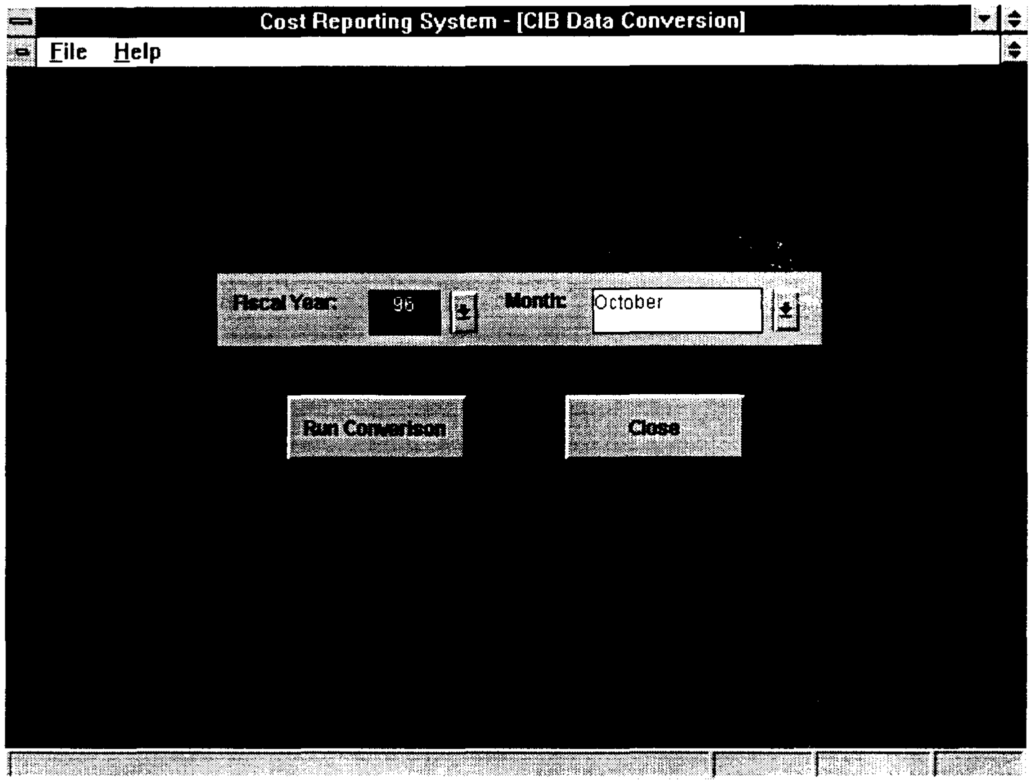
After importing the required data from TRS and FFS, the user must verify that the imported data uses valid project, activity, and organization codes. In order to validate these codes, the user clicks the Run Validation button. Only when all TRS data for a month has been received will the user be able to user be able to use the Run Validation button. If all pay period data for a month has not been received, the user will see the following message box.

Figure 3-23 ***Conversion Message Box***



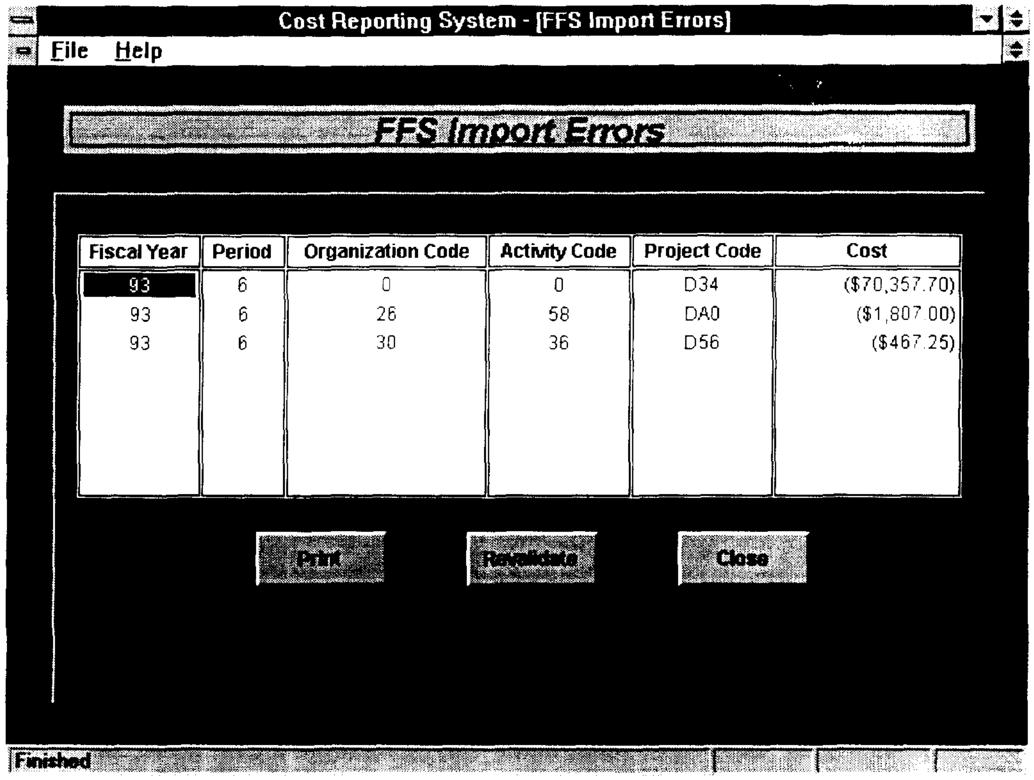
In order to convert the data into useful information that CRS may interpret, the user must click the Run TRS Data Conversion button. This button opens the Data Conversion Window which appears in Figure 3-24.

Figure 3-24 ***TRS Data Conversion***



If there are errors found in the code validation process, the user may view them by clicking on the Produce Error Report button which opens the Error Report window. As in Figure 3-25, this window will illustrate all data that failed to be verified.

Figure 3-25 **Error Report Screen**



3.4.9 Error Reports

Clicking the Error Reports button from the System Maintenance screen opens up the Error Report Window. FFS data that failed the code validation test during validation appear in the table shown on the screen. Data is categorized by organization code, activity code, and project code. In general, any errors in activity code, project code, and organization code are because these codes have not been added to the CRS. Since this data is invalid, the user must manually correct the data on this screen. The user may click print to order to have a paper version of the table. If necessary, the user may edit individual records and resubmit them for validation. To do this editing, the user must press the F9 key to initiate the edit mode, make the necessary changes, press F9 again to exit the edit mode. When finished making changes, the user must click the Revalidate button in order to re-enter the records through the validation process. Clicking the Close button returns the user to the previous screen

3.4.10 Import Data

This button imports the data from an existing flat file. After clicking the Import Data button, the system notifies the user upon completion. The flat file is created on a monthly basis by the FFS Cost Reporting Data Extraction Program. Validation errors can be viewed by clicking the Error Reports button on the System Maintenance Screen. Cost data that passes validation is appended to the table that contains the raw accounting data.

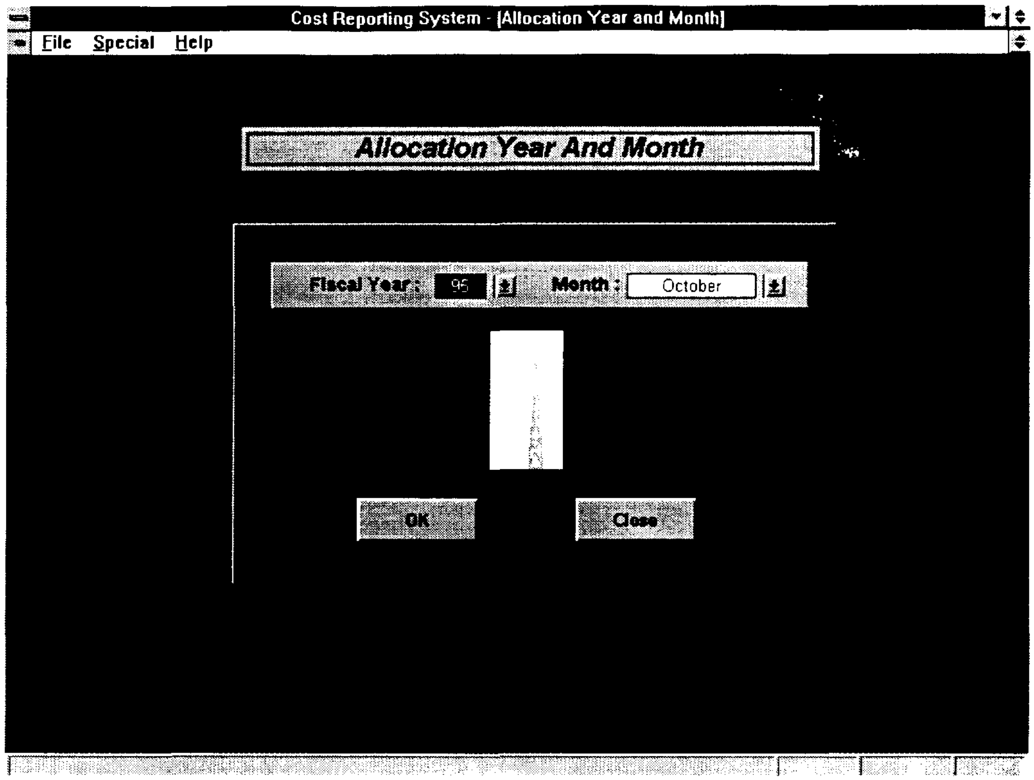
3.4.11 Main Menu

This button returns the user to the OMD Options screen.

3.4.12 Run Allocations

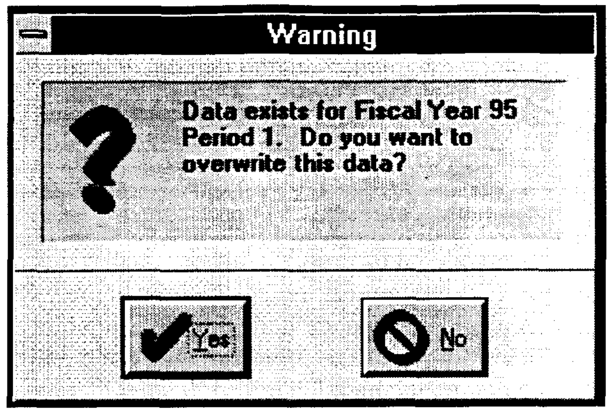
This button enables the user to run the allocation process. The window appears in Figure 3-26. The user must select the particular fiscal year and month on which to run the allocations. The user must click the OK button to execute the task.

Figure 3-26 ***Allocation Process Screen***



If the selected fiscal year/month combination has already been allocated, the system notifies the user as shown in Figure 3-27. The user has the choice as to whether or not to overwrite the existing allocated data or halt the process.

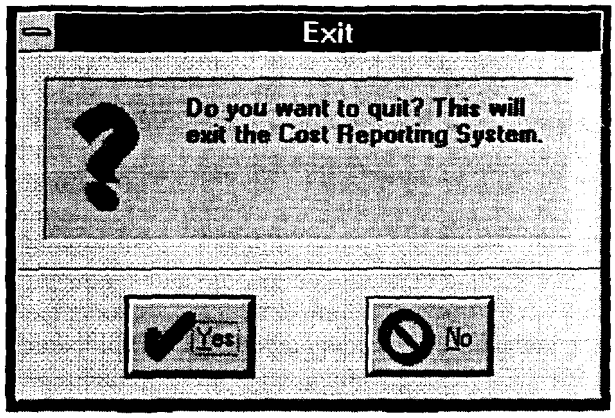
Figure 3-27 ***Allocation Message Box***



3.4.13 Exit CRS

This button allows the user to exit the CRS system. After clicking the Exit CRS button, the user will view the message box shown in Figure 3-28. To exit CRS, the user must click YES.

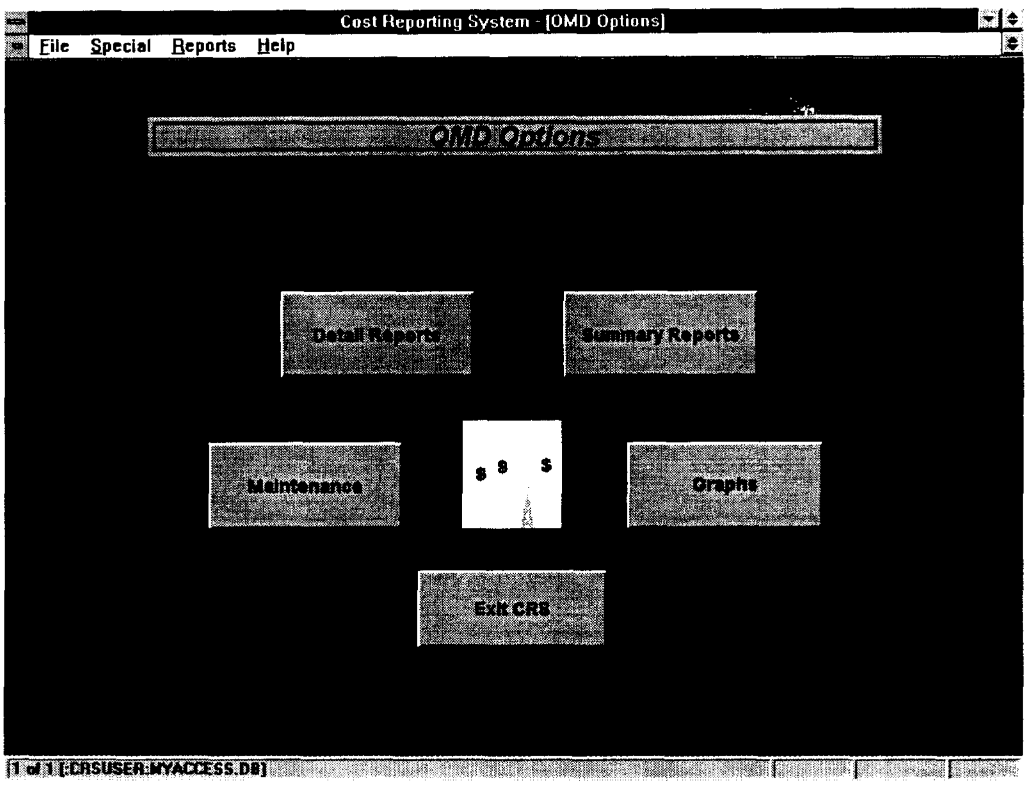
Figure 3-28 ***Exit Message Box***



4 Exiting CRS

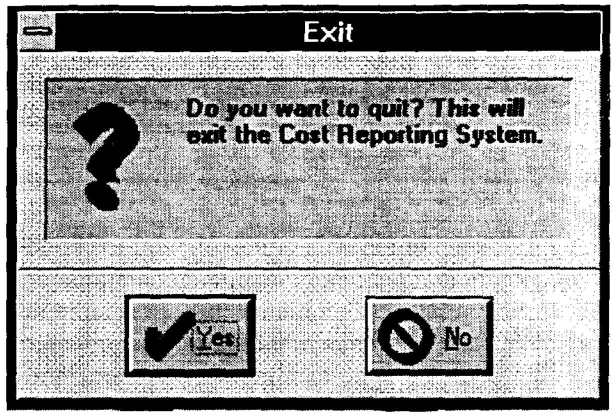
In order to exit the CRS, the user must click the Exit CRS button on the OMD Options screen which appears below in Figure 4-1.

Figure 4-1 ***OMD Options Screen***



After clicking the Exit CRS button, the user will view the message box shown in Figure 4-2. To exit CRS, the user must click YES.

Figure 4-2 ***Exit Message Box***



American Management Systems, Inc.
Management Systems and Technology Group
1777 North Kent Street
Arlington, Virginia 22209
(703) 841-6421
(703) 841-6704 FAX

North American Offices
Alexandria, VA
Arlington, VA
Atlanta, GA
Boston, MA
Bremerton, WA
Brooklyn, NY
Chesapeake, VA
Chicago, IL
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